Record keeping – Quality improvement guide

| Policies & Procedures | Staff Identification | Training | User Accountability | Risk Assessment |
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| * Develop and implement policies and procedures that provide clear steps and can be effectively maintained.
* Use forms or checklists to help staff complete record keeping tasks.
* Computer security.
* Review and modify your policies and procedures regularly.
 | * Allocate the appropriate resources (staff and physical) needed to maintain records.
* Nominate a practice champion to oversee internal audits.
* Delegate responsibility for monitoring administrative record keeping practices.
 | * Keep a record when staff are trained and what they attended.
* Regularly hold training sessions for any updates to policies and procedures.
* Keep current by seeking advice from professional peak bodies or training institutions.
 | * Make sure information is collected and stored in a consistent way and all staff follow the same policies and procedures.
* Monitor security and access of patient records.
* Review and update user access to computer systems on a regular basis.
 | * Know your responsibilities.
* Know where to get support
* Review your policies and procedures regularly and invite your staff to provide feedback.
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| Tips |
| Complete the [administrative record keeping](https://www.health.gov.au/resources/publications/medicare-administrative-record-keeping-checklist) and [electronic administrative record keeping](https://www.health.gov.au/resources/publications/medicare-electronic-administrative-record-keeping) checklists to evaluate and review your current processes and procedures.Use the [Medicare billing assurance](https://www.health.gov.au/resources/publications/medicare-billing-assurance-toolkit-strategies-to-minimise-risk) and [Medicare billing assurance charter](https://www.health.gov.au/resources/publications/medicare-billing-assurance-charter) templates to set out the principles and procedures that support your practice’s billing activities under Medicare. | Select a staff member who will enjoy the challenge, accept responsibility and remain accountable.Challenge your staff to come up with finding new ways to achieve results. | Make sure staff:**Know their responsibilities** – what to record, how to maintain records and how long they should be kept.**Know where to get support** – [AskMBS](https://www.health.gov.au/contacts/askmbs-email-advice-service) responds to enquiries about services listed on the Medicare Benefits Schedule and advice on interpretation of MBS items explanatory notes and associated legislation. | Allocate the appropriate resources needed to maintain your records, for example, staff and physical resources. You may choose to make the [Administrative Record Keeping Guidelines](https://www.health.gov.au/resources/publications/administrative-record-keeping-guidelines-for-health-professionals) a part of the range of record keeping guidance tools that you have available for staff in your practice. | Conduct your own quarterly audit. Review 10 records at random from each GP in your practice for specific qualities such as clarity, timeliness and consistency.The [Health professional guidelines](https://www.health.gov.au/resources/collections/health-professional-guidelines) help you to understand what documents can be used to substantiate services if you are asked to participate in a compliance audit or review. |